

Fig. 1

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Internet Portal.com (personalized page)

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35

34

Search	Server Name	User Name	Password
Agent	LBC.com	John Doe	XXXXXXX
Last	My Bank.com	John R. Doe	XXXXXX
Update	My Stocks.com	John R. Doe	XXXXXXXXXX
ADD	My Shopping.com	Jane L. Doe	XXXXXXX
	Mortgage.Com	John/Jane Doe	XXXXXXXXXX
	Airline.com	John Doe	XXXXXXX

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41

43

45

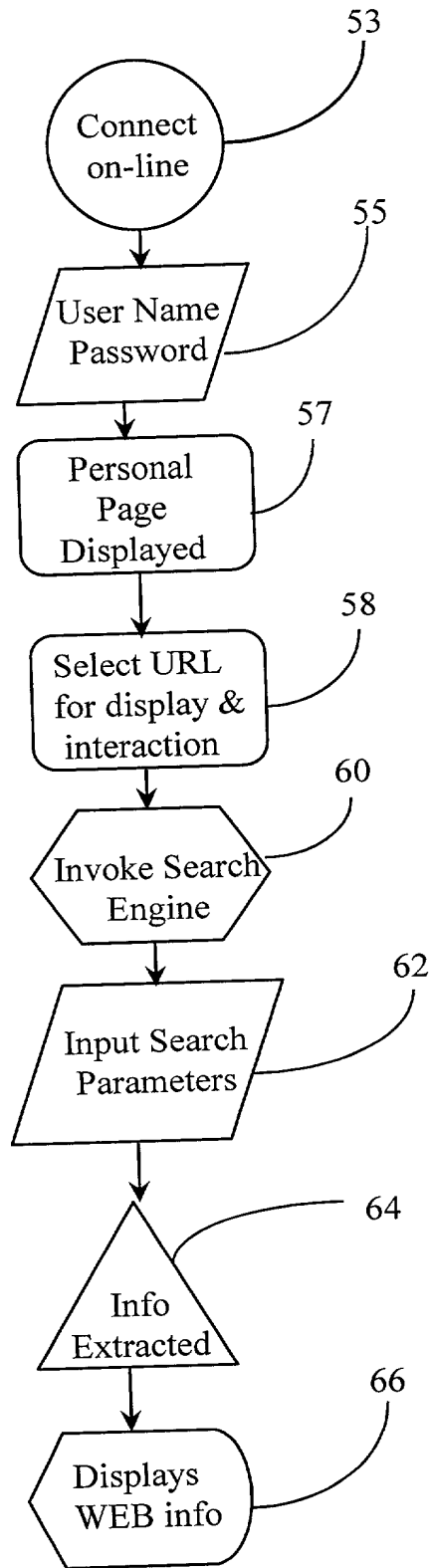
Search String

51

52

Search

Fig. 2



**Fig. 3**

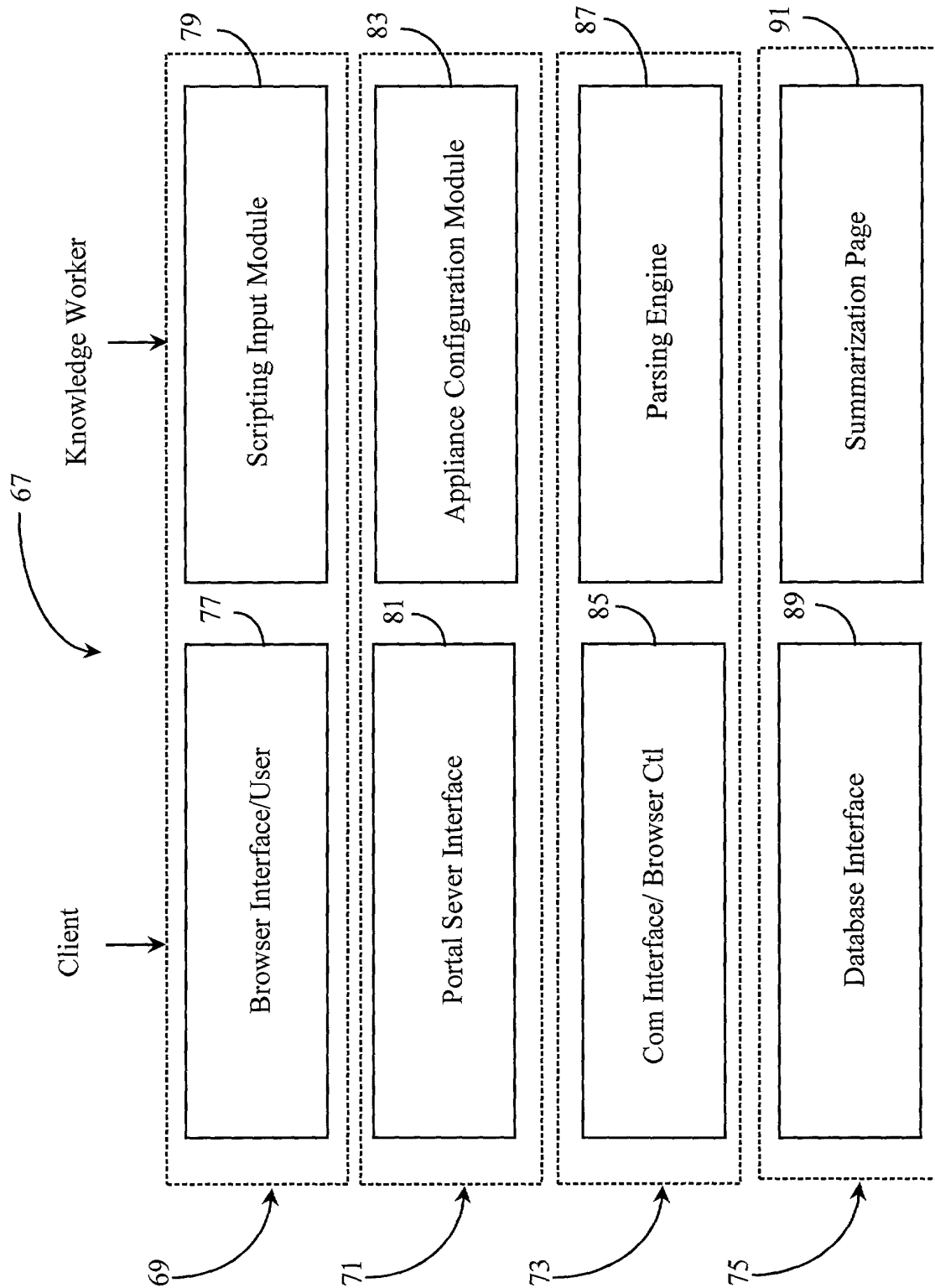
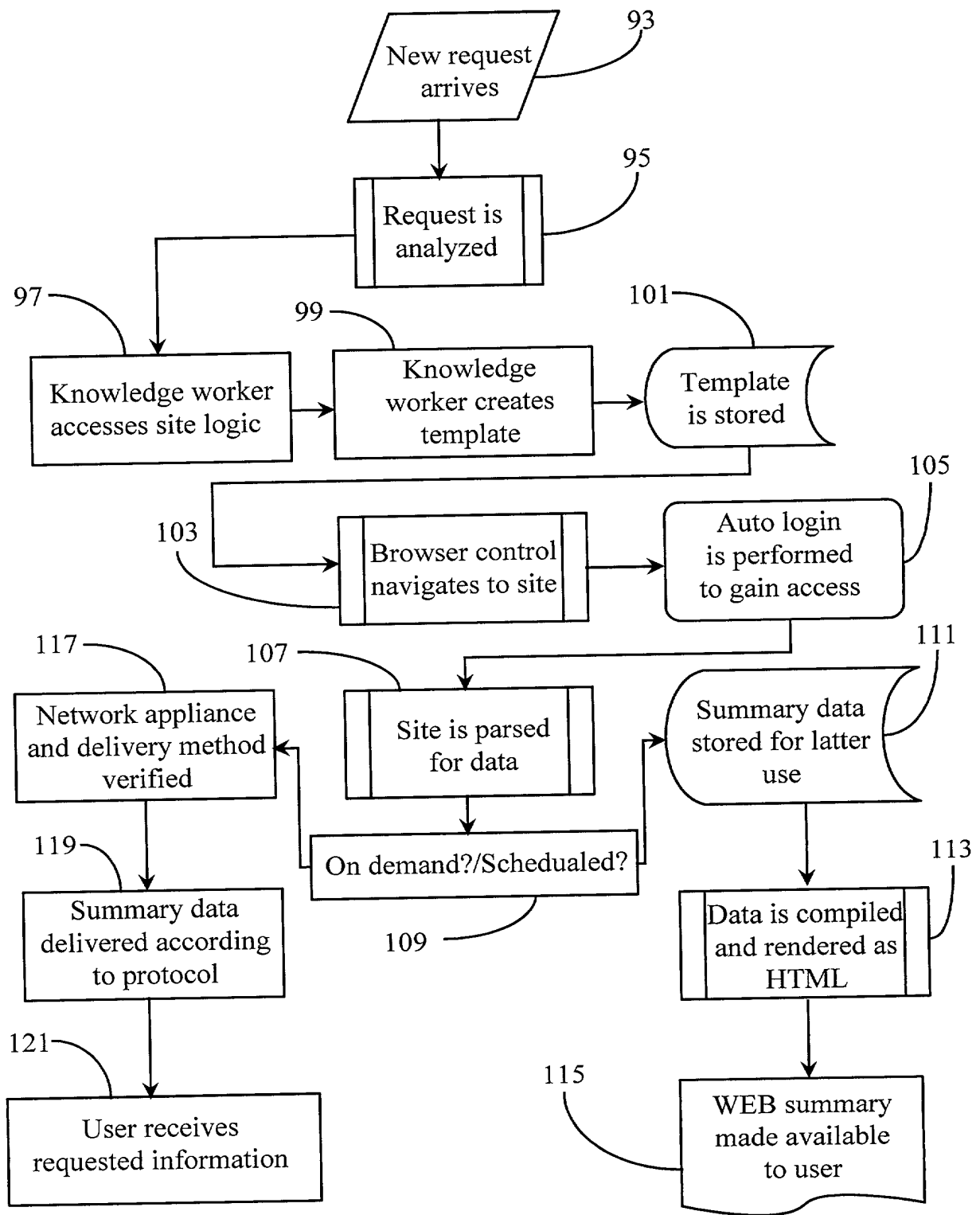
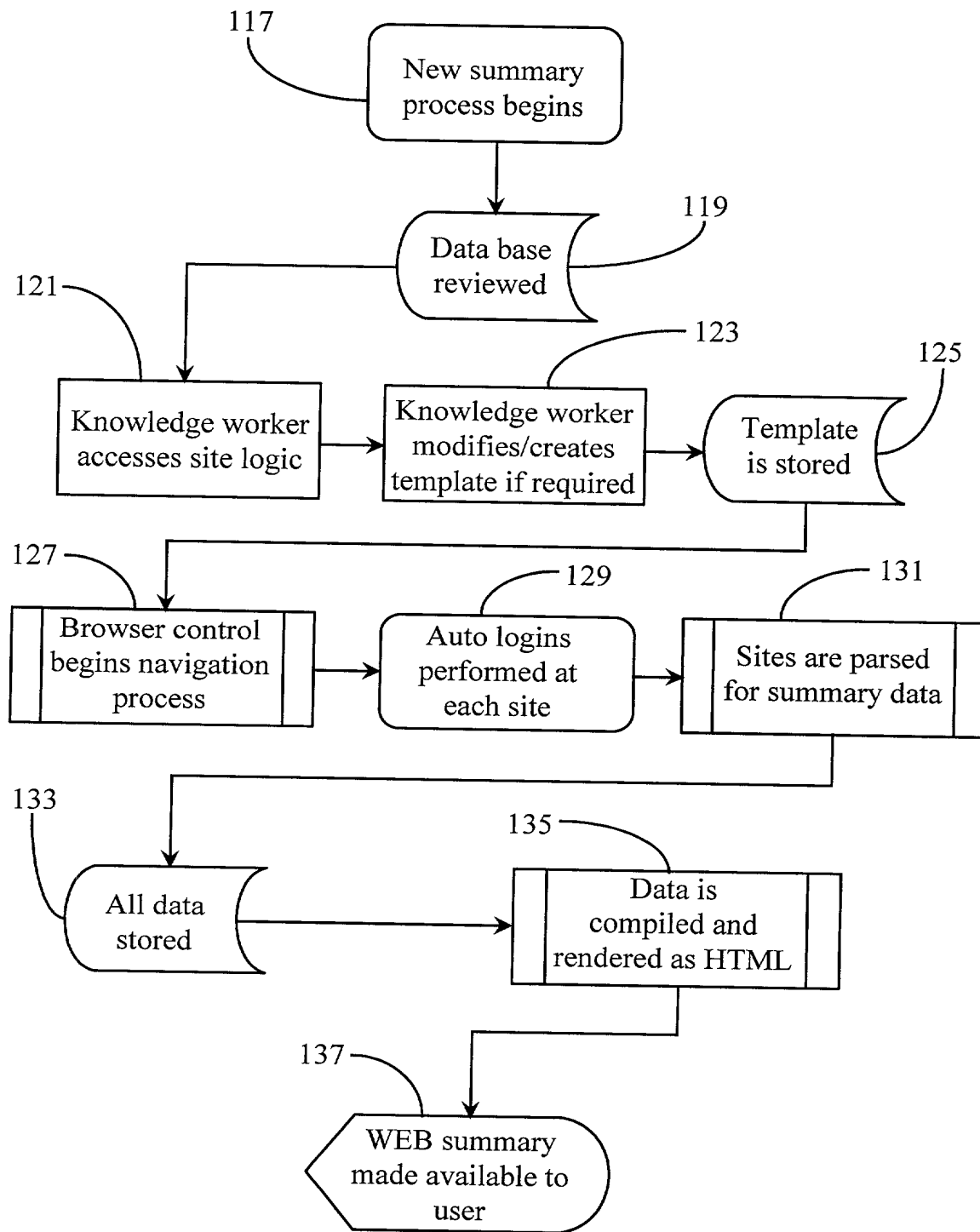


Fig. 4



**Fig. 5**



**Fig. 6**

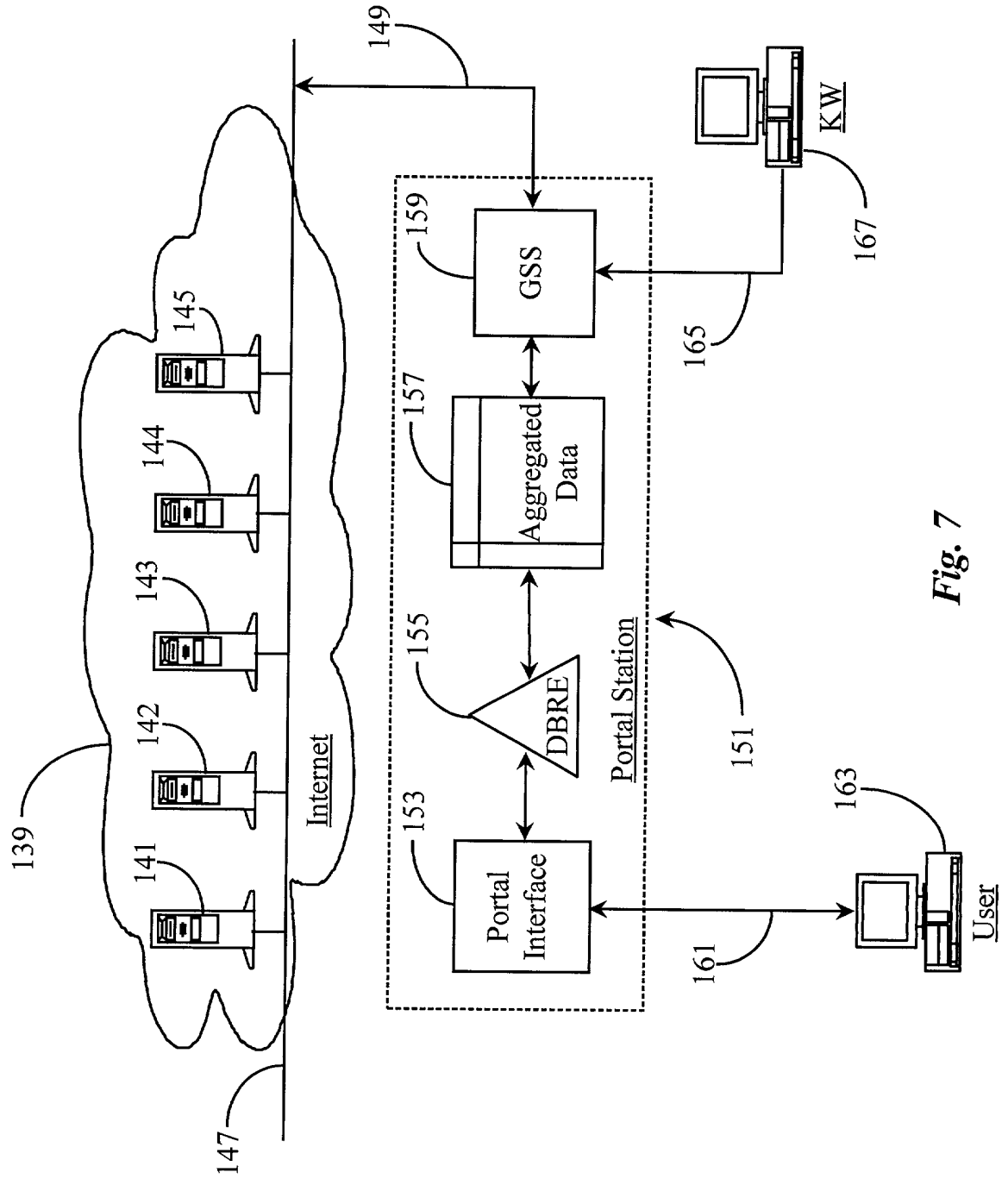


Fig. 7

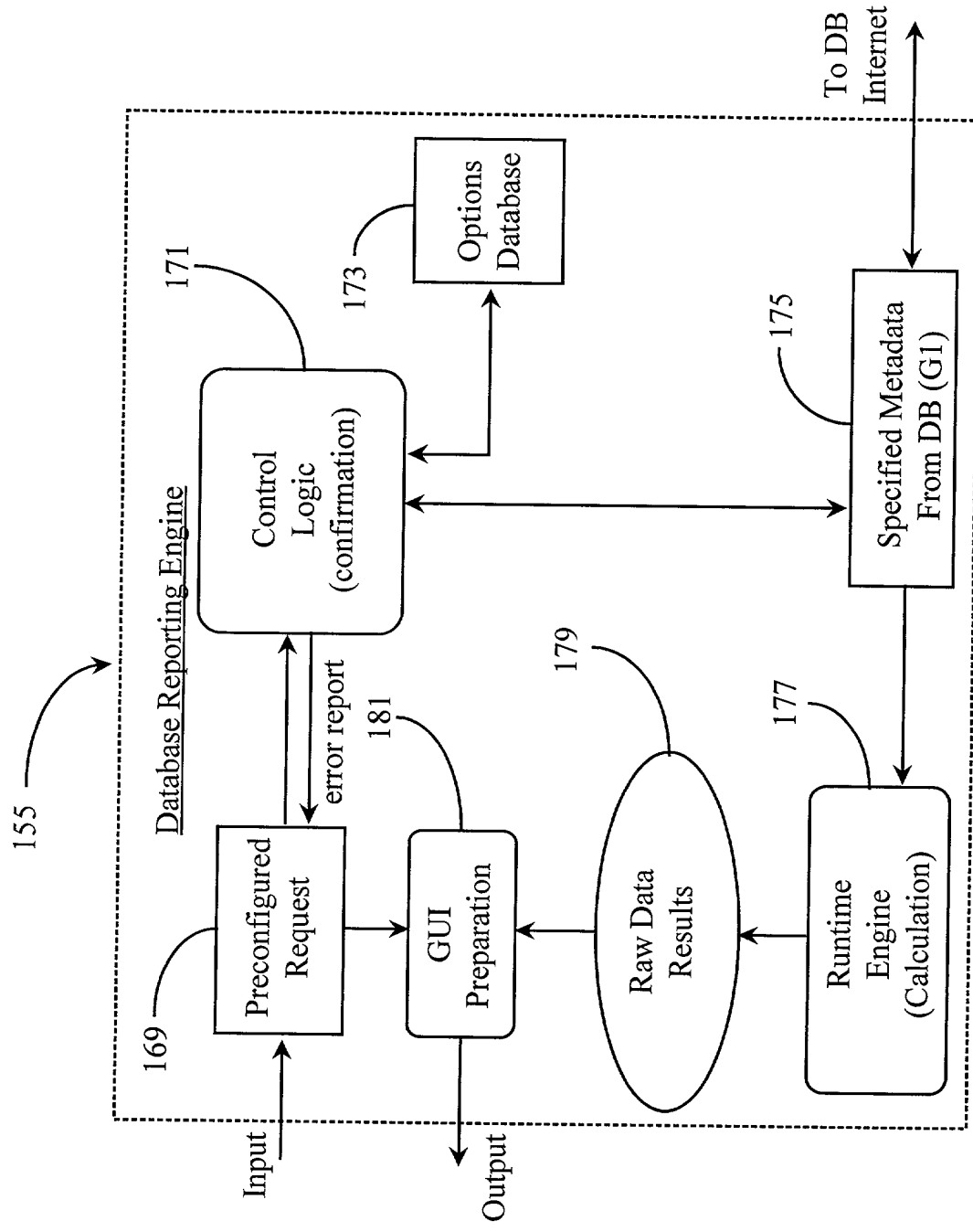
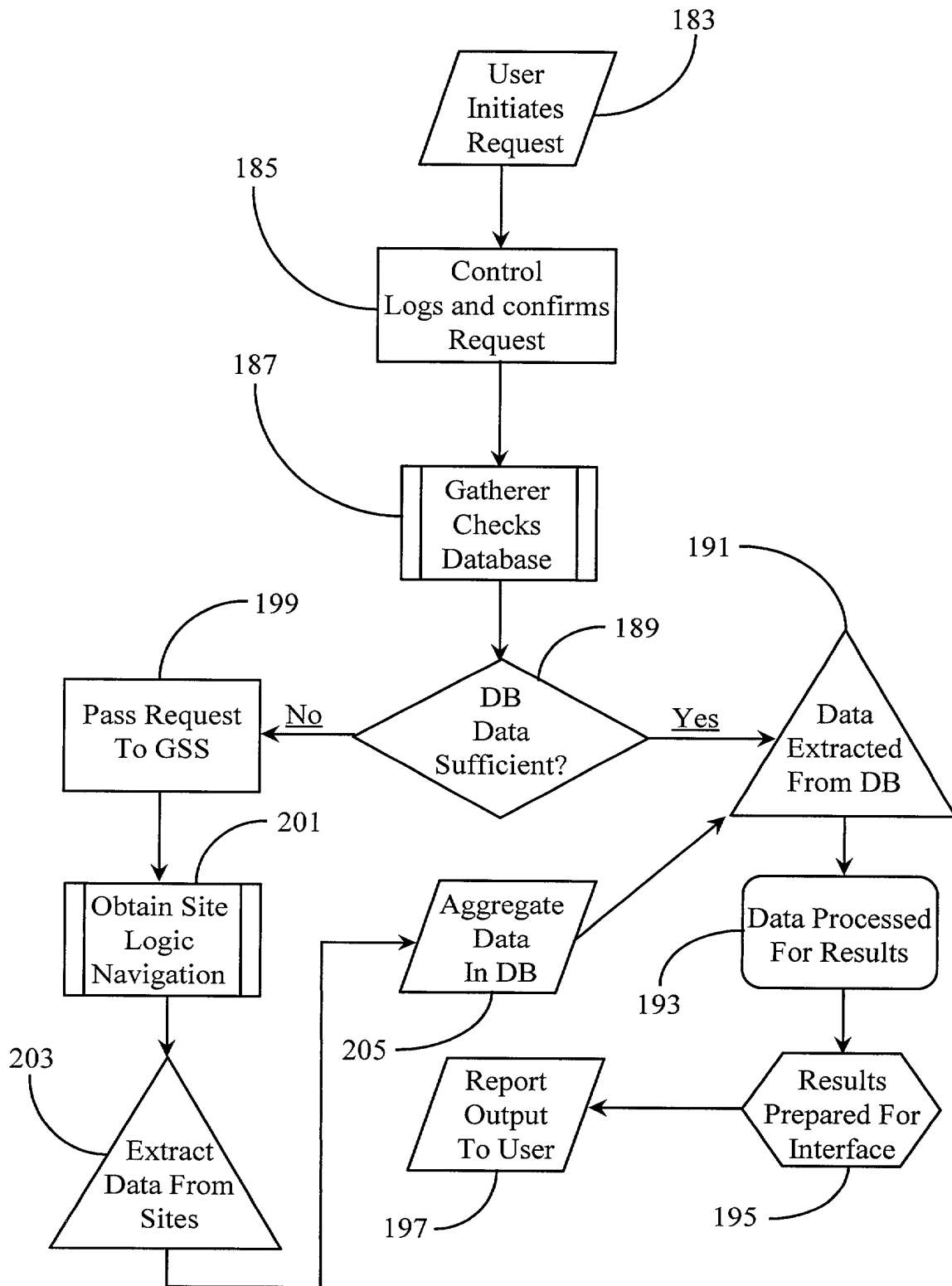


Fig. 8





**Fig. 9**

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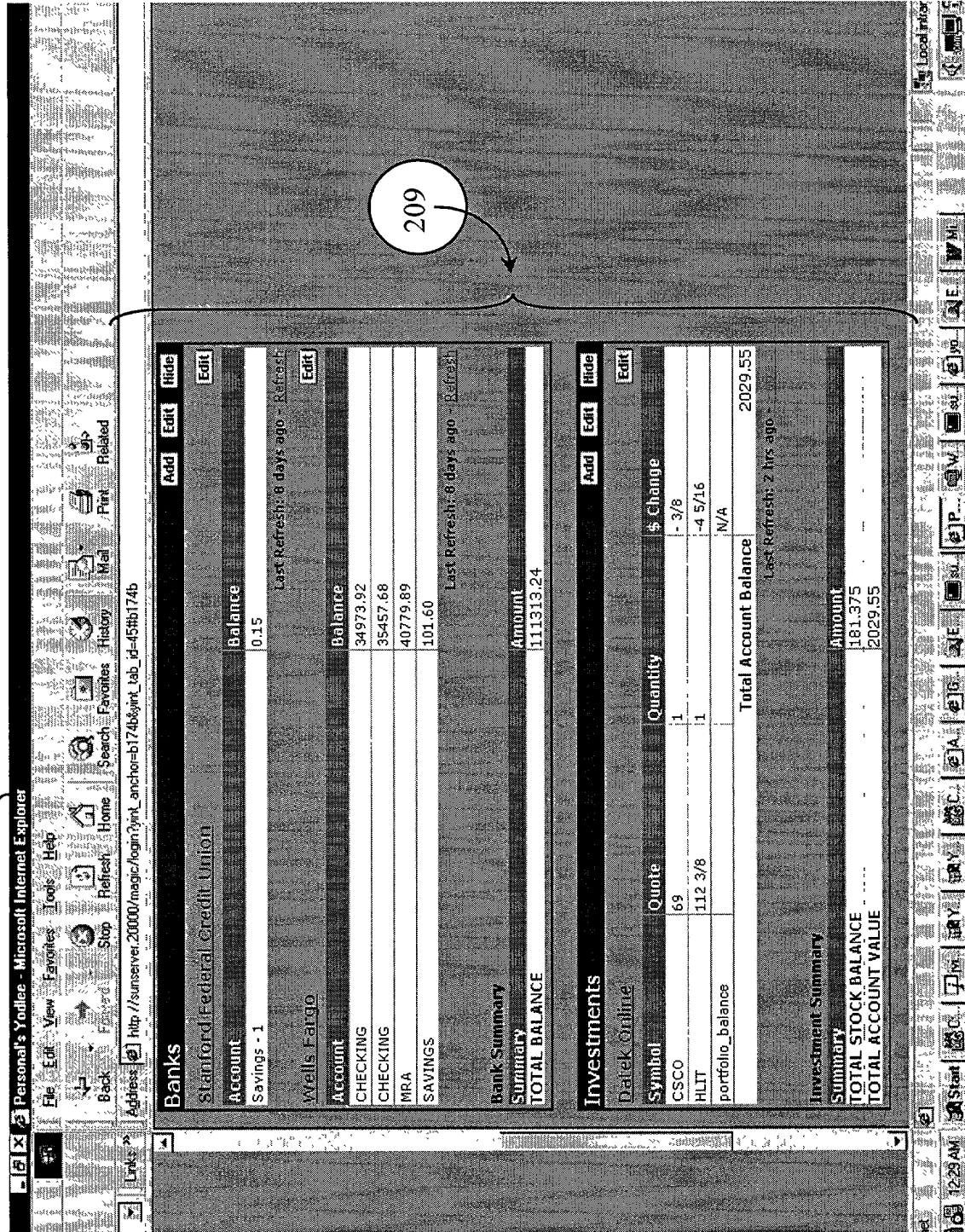


Fig. 10

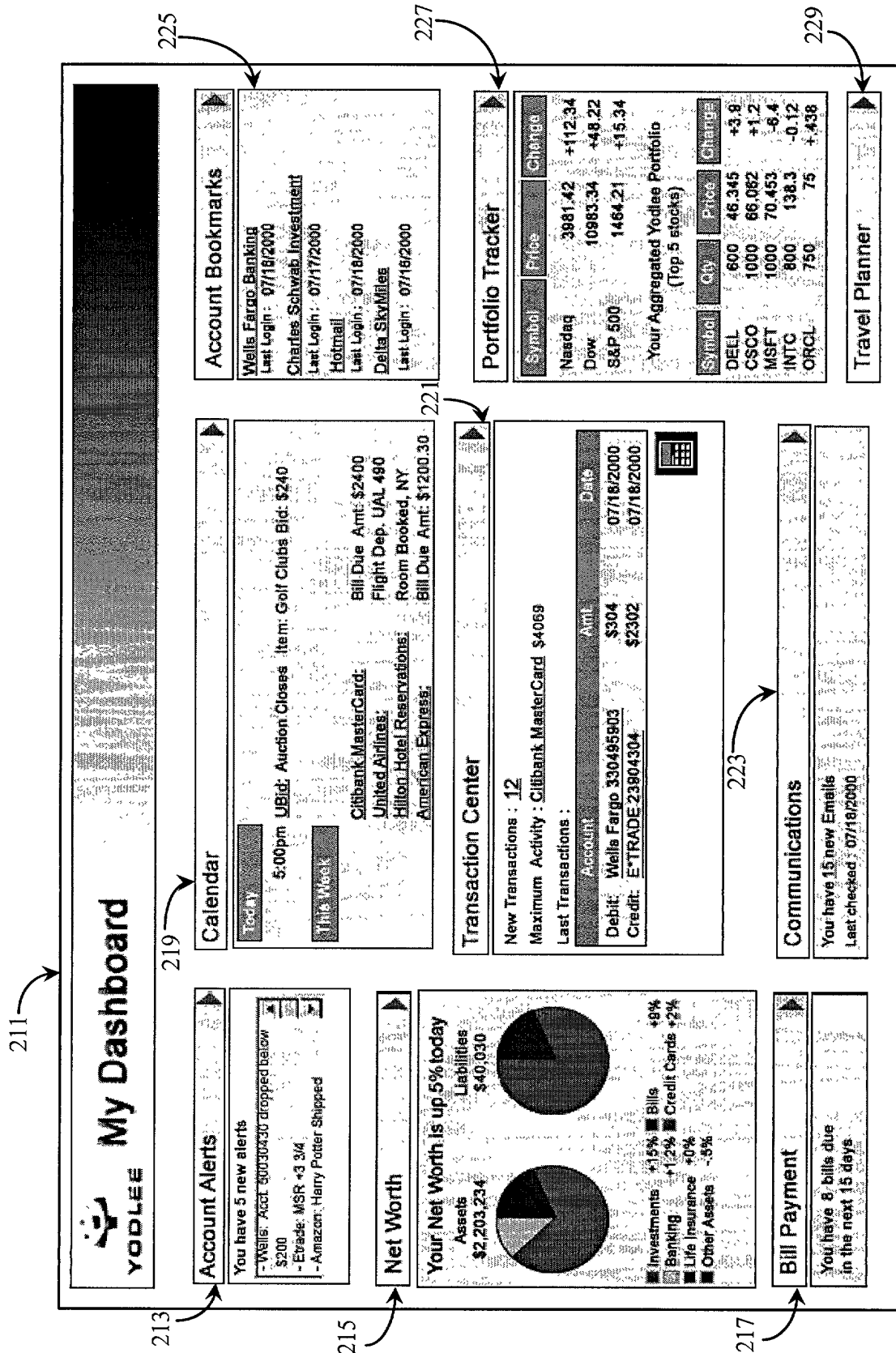


Fig. 11

**YODLEE My Dashboard**

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**YODLEE CALENDAR**

DAY WEEK MONTH YEAR

◀ JULY 2000 ▶

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Today is July 18th, 2000

[JULY 18 - 24, 2000](#) 233 Print

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**Tuesday July 18th**  
 5:00pm LEld: Auction Closing - Item: Golf Clubs HighBid: \$240

---

**Wednesday July 19th**  
 6:00am United Airlines: Flight Departure - Flight # UAL490 Departing SFO  
 10:00am Hilton Hotel Reservations: Room Booked - New York Hilton, Single Room

---

**Thursday July 20th**  
 All Day ChlBank MasterCard: Bill Due - Amt. \$2400

---

**Friday July 21st**  
 8:00am - 9:00am Fee Time - Silver Vista Golf Club. Call Jim.

---

**Saturday July 22nd**  
 All Day Amazon.com: Back Order 1205043 Due to ship - Item. Harry Potter Price: \$20  
 All Day Pacific\*Bell: Bill Due - Amt. \$100

---

**Sunday July 23rd**  
 All Day PG&E: Bill Due - Amt. \$100.34

---

**Monday July 24th**  
 All Day American Express: Bill Due - Amt. \$1200.30

[Click on an Account to log in](#)

Fig. 12

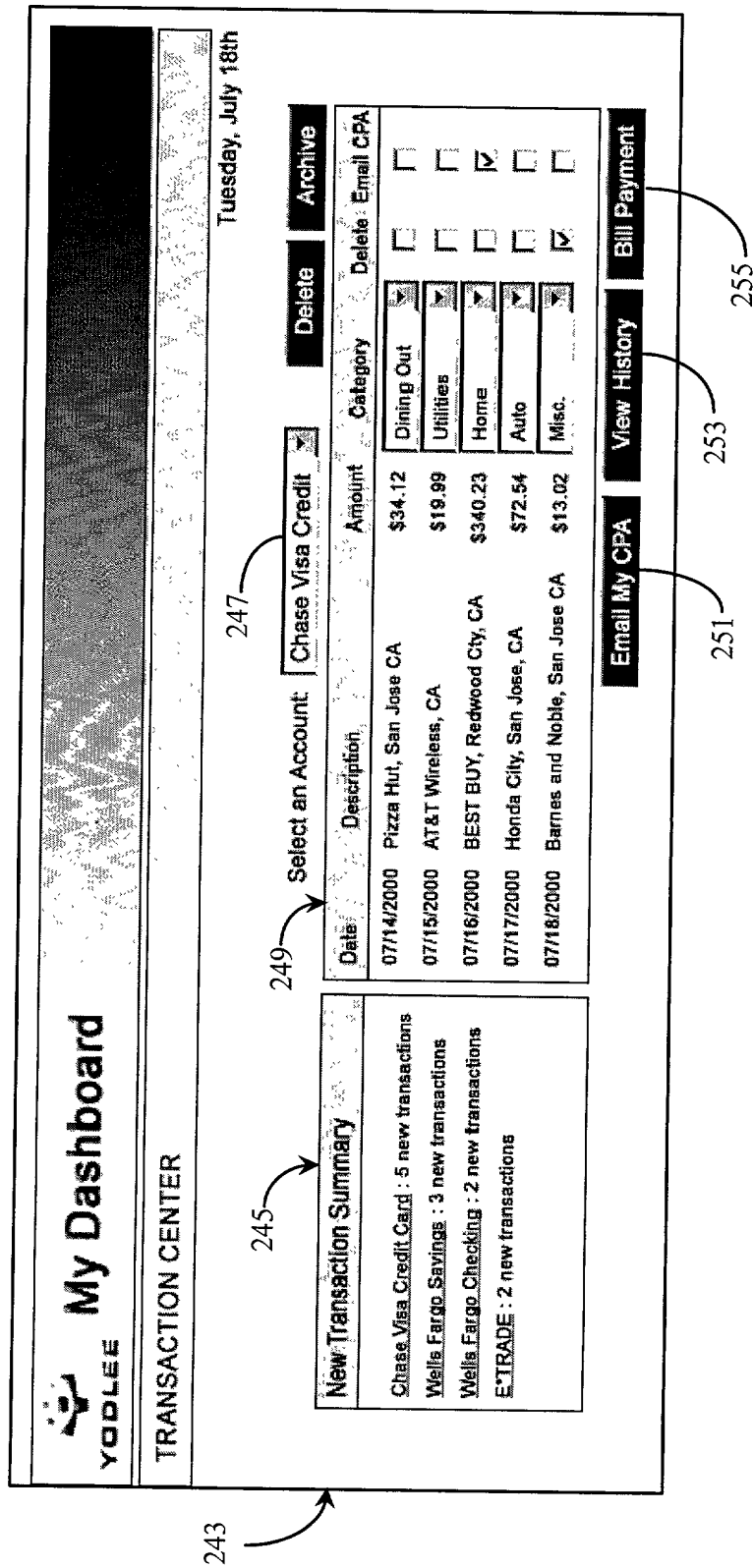


Fig. 13

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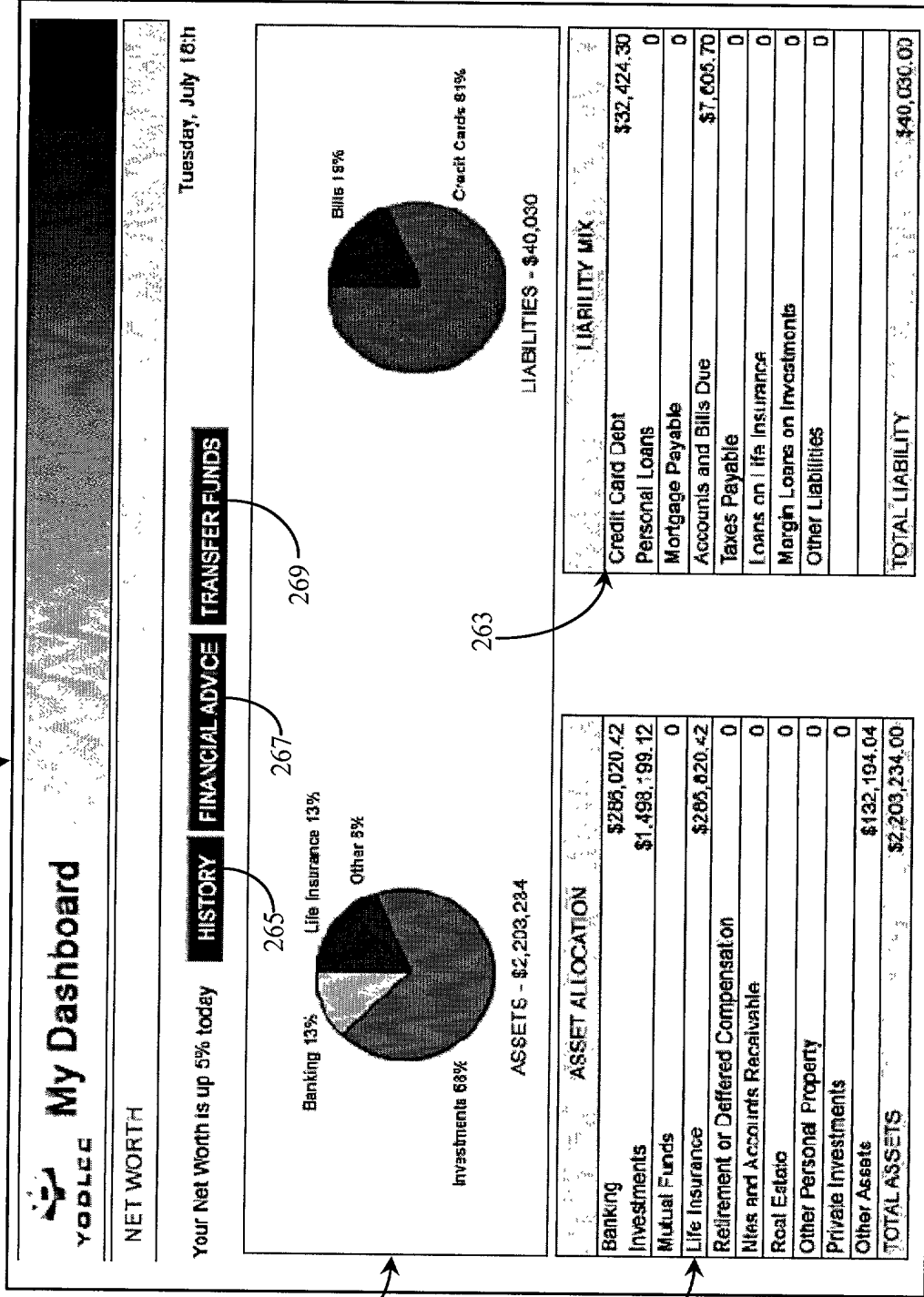



Fig. 14

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# My Dashboard

## CONSOLIDATED PORTFOLIO TRACKER

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Your Yodlee Consolidated Portfolio:

Symbol	Name	Quantity	Price	Est. Value
DELL	Dell Computer Systems	1500	46.345	\$69,517.50
CSCO	Cisco Systems	2000	66.062	\$132,124.00
MSFT	Microsoft Corporation	1200	70.453	\$84,543.60
INTC	Intel Corporation	3000	138.3	\$414,900.00
ORCL	Oracle Corporation	4500	75	\$337,500.00
EXDS	Exodus Communications	200	85.47	\$17,094.00
				<b>TOTAL POSITION VALUE: \$1,125,195.00</b>

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View Individual Holdings

Charles Schwab	Go
Charles Schwab	Go
Merill Lynch	Go
Roth IRA	Go
Fidelity 401K	Go
Fidelity 401K	Go
Roth IRA	Go
Merill Lynch	Go

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Include the following Accounts

<input checked="" type="checkbox"/> Charles Schwab
<input checked="" type="checkbox"/> TD Waterhouse
<input checked="" type="checkbox"/> Fidelity 401K
<input checked="" type="checkbox"/> Roth IRA
<input checked="" type="checkbox"/> E*TRADE
<input checked="" type="checkbox"/> Merill Lynch

Tuesday, July 18th

Fig. 15

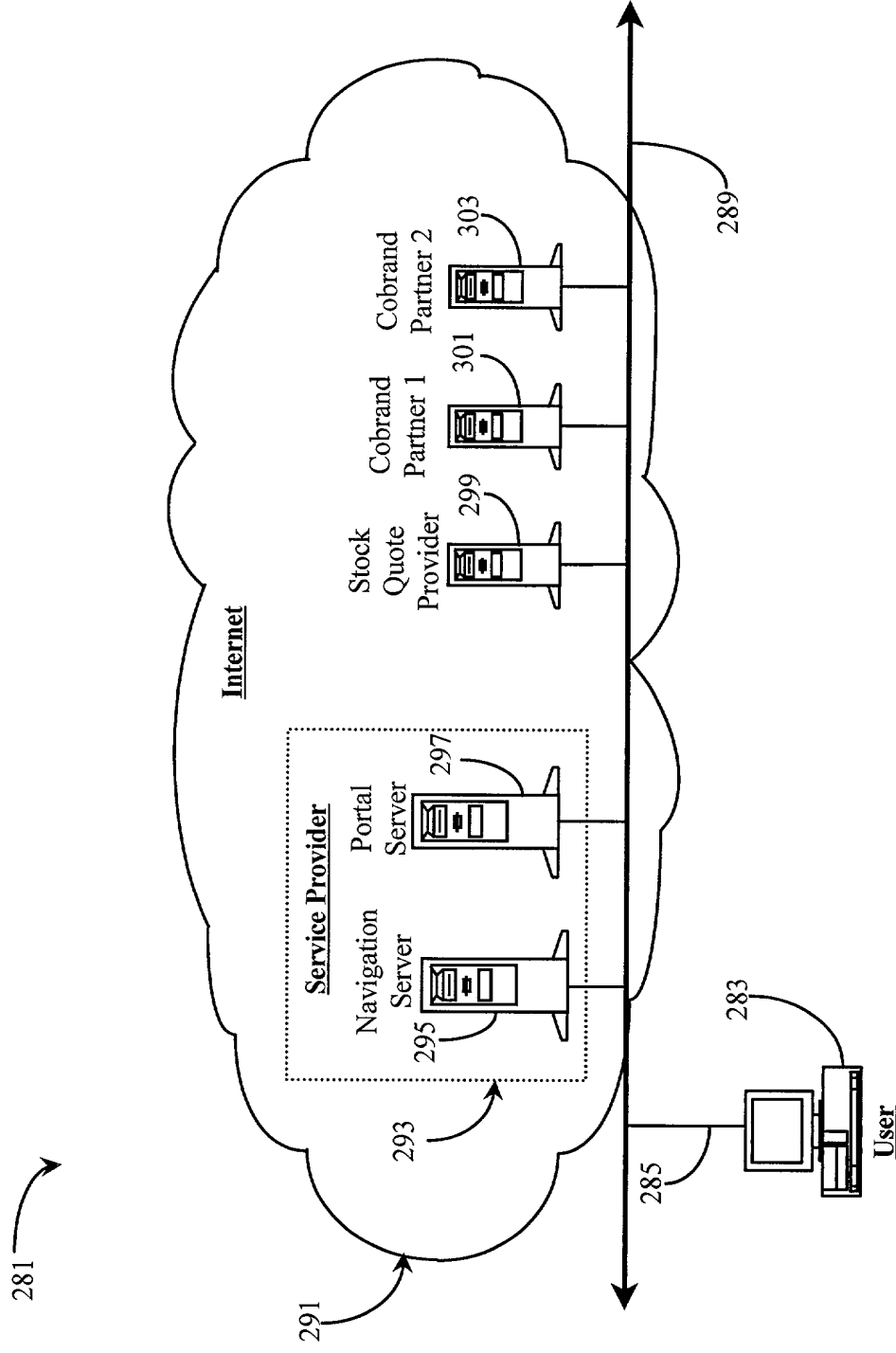


Fig. 16



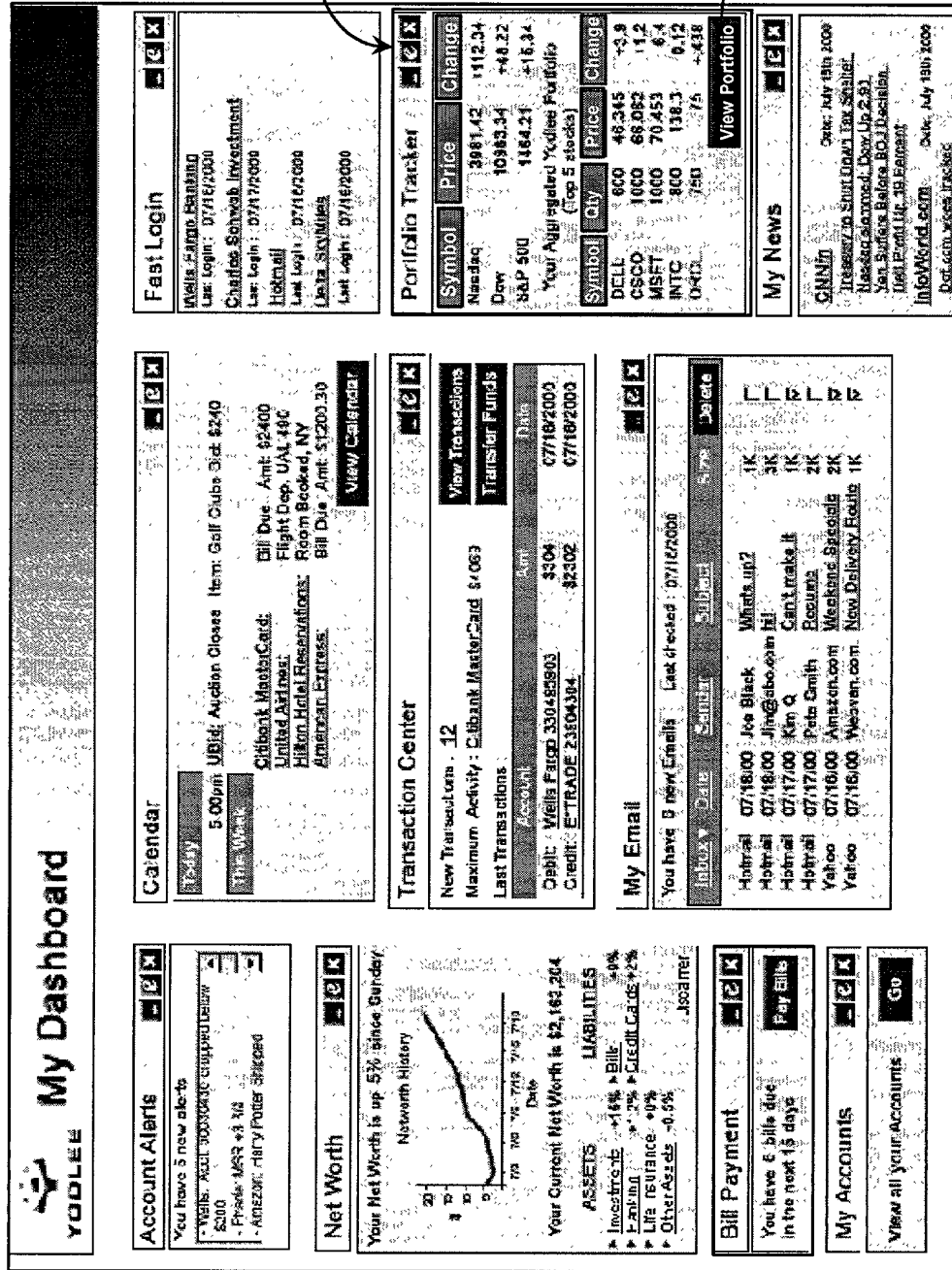
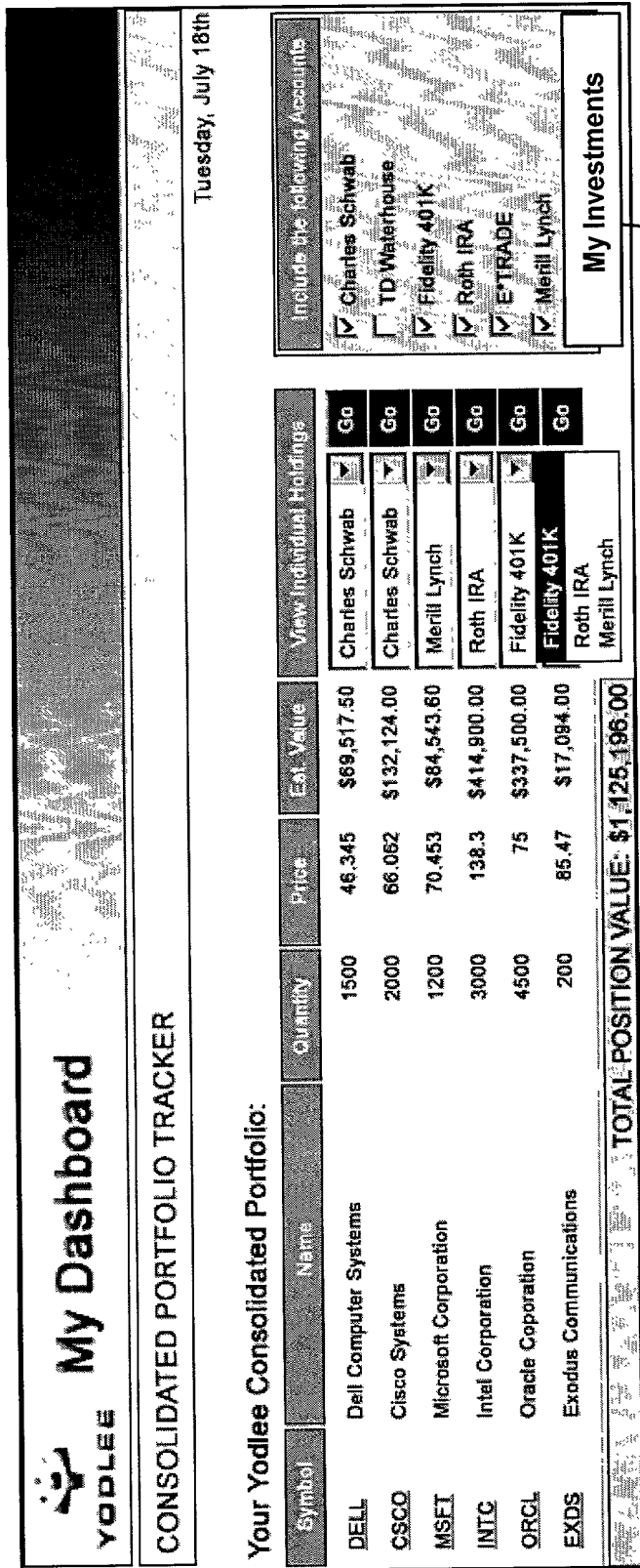


Fig. 17



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Portfolio Tracker

Fig. 18

# My Investments

My Investments					Print	Edit
Symbol	Quantity	Price	as of	\$ Change	Calculated Value	
AOL	100	53.000	12:34	+1.50	5,300.00	
EMC	--	92.125	--	-1.75	--	
FMAGX	50	138.660	10/09	+ .25	6,933.00	
MSFI	50	72.190	12:35	+ .15	3,609.38	
Cash	--	--	--	--	2,375.12	
Total Value					18,217.50	
Price, as of and \$ Change provided by S&P Comstock,					Get Quote	

315 317

Fig. 19

### View Investment Account

Select Investment Account

You have shares of INTC in more than one account.  
Select the account you would like to view.

☒ Charles Schwab  
☐ Paine Webber  
☐ E\*Trade

Cancel

OK

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Fig. 20

## Select Securities

### Select Securities

Select the investment accounts you want to track in your portfolio.

- ☒ Charles Schwab
- ☒ Paine Webber
- ☒ E\*Trade

Don't see your brokerage account?

[Add a New Account](#)

Select the indices you want to track in your portfolio.

- ☒ Dow Jones Industrial Average
- ☒ NASDAQ Composite
- ☒ S&P 500

Enter symbols for other stocks and funds you want to track, separated by commas.

EMC

Cancel

Update Portfolio Now

Fig. 21

## Portfolio Set Up

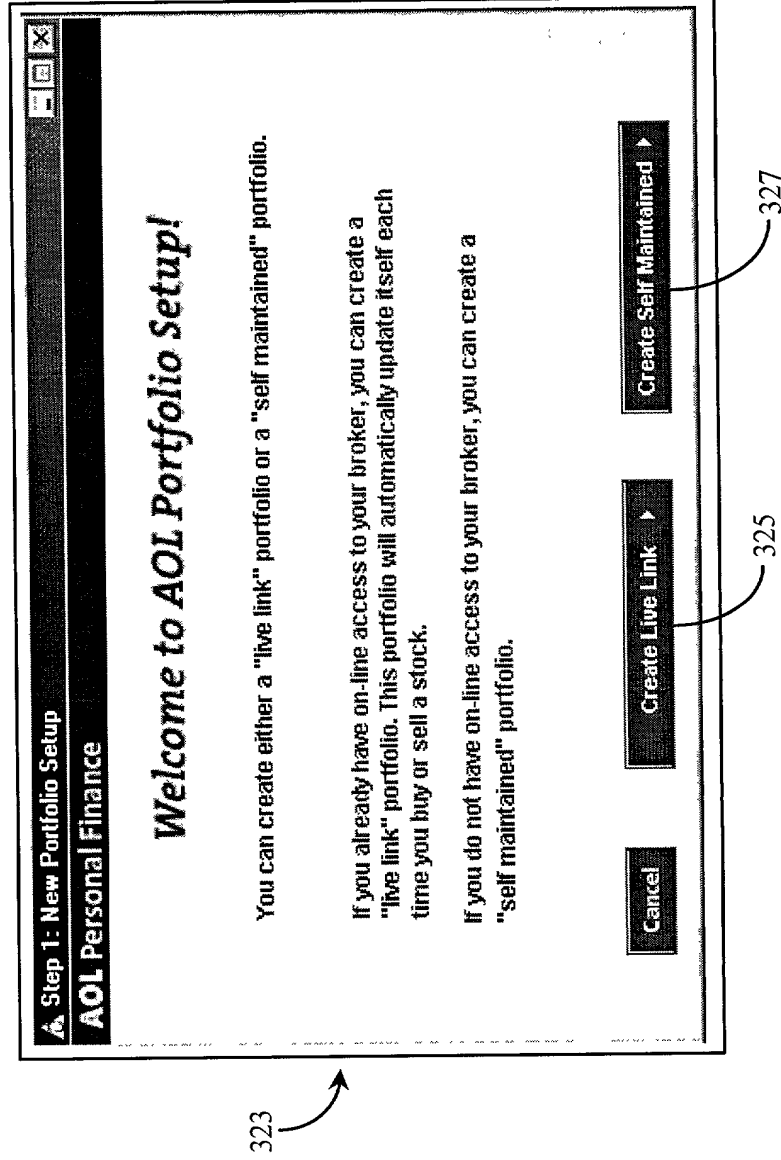


Fig. 22

# Portfolio Main

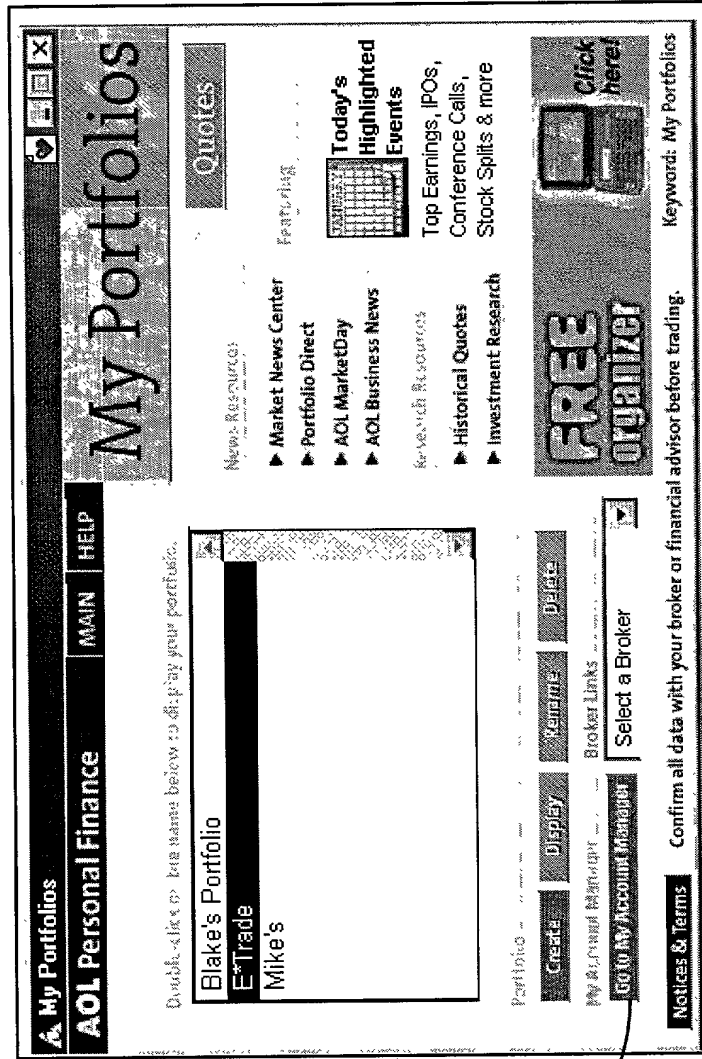


Fig. 23

## Portfolio Display

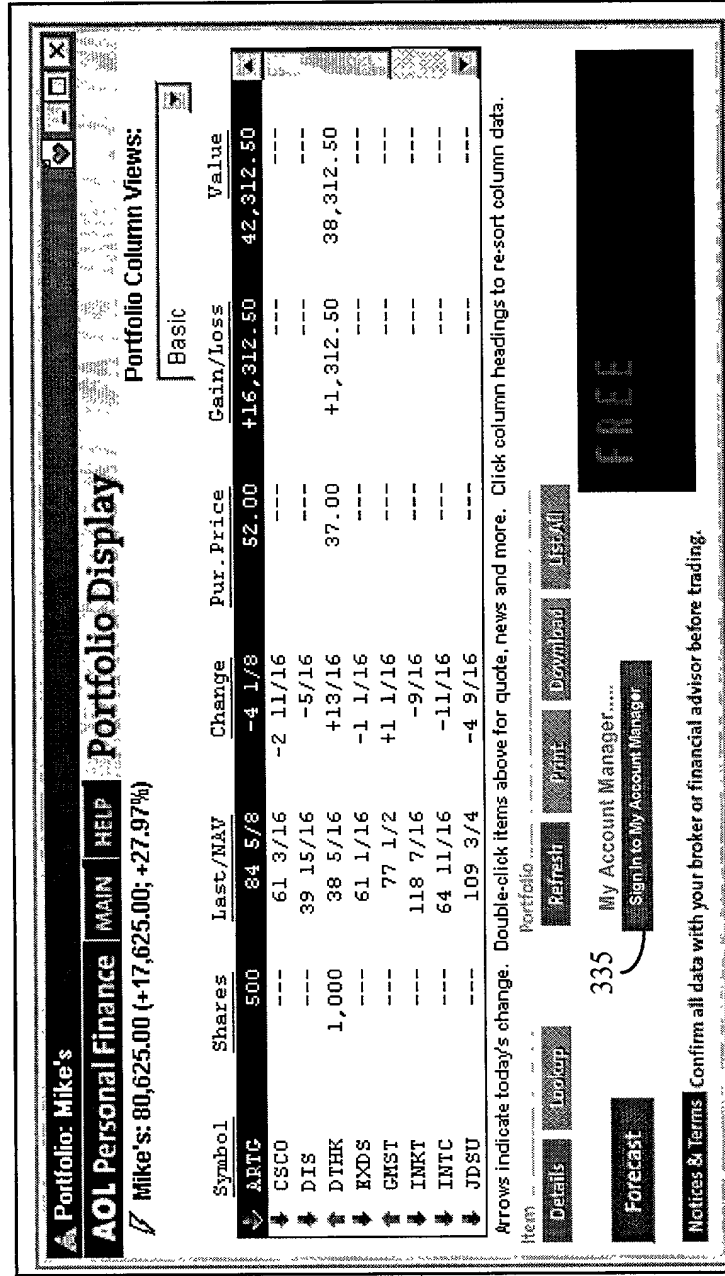


Fig. 24